

Centers for Medicare & Medicaid Services

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| **CMS Enterprise Portal Quick Reference Guide (QRG)**  **User Login** |
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# Introduction

This guide provides step-by-step instructions for how to log in to access ***<Your application name>*** using an existing CMS Enterprise Portal account. It also provides step-by-step instructions on how to use the following self-service features during login for assistance:

* ‘Unable to Access Security Code?’ link
* ‘Register MFA Device’ link
* ‘Forgot User ID’ link
* ‘Forgot Password’ link

***Note****: For more information on registering for Multi-Factor Authentication (MFA), refer to the Quick Reference Guide for Existing Users Adding MFA to Application Role.*

Users will be required to log in prior to accessing any Centers for Medicare and Medicaid Services (CMS) application by providing a User ID and Password. If the user’s profile is configured with MFA, the system will prompt the user to also enter an MFA Security Code at the time of login.

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| **Multi-Factor Authentication (MFA)**  Multi-Factor Authentication (MFA) is a security mechanism that is implemented to verify the legitimacy of a person or transaction.  MFA requires you to provide more than one form of verification in order to prove your identity. MFA registration is required only once when you are requesting a role, but will be verified every time you log into the CMS Enterprise Portal.  During the MFA registration process, the CMS Enterprise Portal requires registration of a phone, computer, or email to add an additional level of security to a user’s account.  You may select from the following options to complete the registration process:   * **Smart Phone**: Download Validation and Identity Protection (VIP) access software on your smart phone/tablet. You must enter the alphanumeric credential ID that is generated by the VIP access client. You will then enter the Security Code generated by the VIP client. * **Computer**: Download VIP access software on your computer. You must enter the alphanumeric credential ID generated by the VIP access client. You will enter the Security Code generated by the VIP client. * **E-mail**: Select the e-mail option to receive an e-mail containing a Security Code required at login. You must provide a valid, accessible e-mail address. * **Short Message Service (SMS)**: Use the SMS option to have your Security Code texted to your phone. You must enter a valid phone number. The phone must be capable of receiving text messages. Carrier charges may apply. * **Interactive Voice Response (IVR)**: Select the IVR option to receive a voice message containing your Security Code. You must provide a valid phone number and (optional) phone extension. |

# **Step-by-Step Instructions for User Login without a Registered MFA Device**

These instructions demonstrate the login process for users who do not have MFA configured in their profile. Please follow each step listed below unless otherwise noted.

| **Steps** | **Screenshots** |
| --- | --- |
| 1. Go to <https://portal.cms.gov/>and select **Login to CMS Secure Portal**on the CMS Enterprise Portal.   ***Note:*** *The CMS Enterprise Portal supports the following browsers: Internet Explorer 11, Firefox, Chrome, and Safari*. | Portal Landing Page |
| 1. Read the ‘Terms and Conditions’ pageand select **I Accept**to continue. | I Accept the Terms and Conditions |
| 1. Enter your **User ID** and select **Next**. | Enter User ID |
| 1. Enter your **Password** and select **Log In**. | Enter password and select Log In. |
| 1. Once you are successfully authenticated, your session will begin. | Welcome to CMS Enterprise Portal |

# Step-by-Step Instructions for User Logins using MFA

These instructions demonstrate the login process for users who have MFA configured in their profile. Please follow each step listed below unless otherwise noted

| **Steps** | **Screenshots** |
| --- | --- |
| 1. Go to <https://portal.cms.gov/>and select **Login to CMS Secure Portal**on the CMS Enterprise Portal.   ***Note:*** *The CMS Enterprise Portal supports the following browsers: Internet Explorer 11, Firefox, Chrome, and Safari*. | Portal Landing Page |
| 1. Read the ‘Terms and Conditions’ pageand select **I Accept**to continue. | I Accept the Terms and Conditions |
| 1. Enter your **User ID** and select **Next**. | Enter User ID |
| 1. Enter your **Password,** select an **MFA Device Type** from the drop-down, enter the **Security Code,** and select **Log In**.   ***Note****: The ‘Security Code’ for the ‘E-mail’ and ‘One-Time Security Code’ options expires after 30 minutes. The ‘Security Code’ for the other MFA device types expires after 10 minutes. If you are unable to enter the code within the period, you will need to request a new one.*  *If you do not have access to your registered MFA device, please refer to the ‘User Login’ QRG for step-by-step instructions on how to register an MFA Device.* | Enter your Password, select an MFA device from the MFA Device Type dropdown, enter the Security Code, and select Log In. |
| 4a. If you select **Phone/Tablet/PC/ Laptop** as the ‘MFA Device Type’, enter the VIP Access software’s ‘Security Code’ as the MFA **Security Code** and select **Log In**. | VIP Access Example  Enter Security Code for Phone/Tablet/PC/Laptop MFA Device Type |
| 4b. If you select **Text Message – Short Message Service (SMS)**, **Interactive Voice Response (IVR)**,or **E-mail** as the **‘**MFA Device Type’,select **Send** to receive the code on the selected MFA device type.  Enter the code in the **Security Code** field and select **Log In**. | Enter Security Code |
| 4c. If you select **One-Time Security Code** as the **‘**MFA Device Type’, enter the code you receive either in the e-mail sent to your registered e-mail address via the ‘Unable to Access Security Code?’ link or from your Application Help Desk in the **Security Code** field and select **Log In**. | Enter Security Code |
| 1. Once you are authenticated successfully, your session will begin. | Welcome to CMS Enterprise Portal |

# Step-by-Step Instructions for ‘Unable to Access Security Code?’ Link

These instructions demonstrate the ‘Unable to Access Security Code?’ process for users who are unable to retrieve a Security Code from their registered MFA device or do not have their registered device available. Please follow each step listed below unless otherwise noted

| **Steps** | **Screenshots** |
| --- | --- |
| 1. Go to <https://portal.cms.gov/>and select **Login to CMS Secure Portal**on the CMS Enterprise Portal.   ***Note:*** *The CMS Enterprise Portal supports the following browsers: Internet Explorer 11, Firefox, Chrome, and Safari*. | Portal Landing Page |
| 1. Read the ‘Terms and Conditions’ pageand select **I Accept**to continue. | I Accept the Terms and Conditions |
| 1. Enter your **User ID** and select **Next**. | Enter User ID |
| 1. Select the **Unable to Access Security Code?** link. | Unable to Access Security Code? link on the Password, MFA Device Type, and Security Code Log in Page |
| 1. Select **OK** to navigate away from the login page. | Unable to Access Security Code pop up |
| 1. Enter your **User ID** and select **Next**. | Enter your User ID page |
| 1. Answer the challenge questions and select **Next**. | Answer the following challenge questions |
| 1. Select **OK** to return to the login page. | Unable to Access Security Code, Security Code Sent Page |
| 1. An e-mail with the Security Code will be sent to the e-mail address on your profile. | Example of email with security code |
| 1. Enter your User ID and select **Next**. | CMS Enterprise Portal User ID Page |
| 1. Enter your Password, select **One-Time Security Code** as the MFA Device Type, and enter the Security Code that was sent to the e-mail address on your profile. Then select **Log In**. | Select MFA Device Type, Senter Security Code, and click Log In button |

# Step-by-Step Instructions for ‘Register MFA Device’ Link

These instructions demonstrate the ‘Register MFA Device’ process for users who are required to login with MFA but do not have an MFA device registered to their account. Please follow each step listed below unless otherwise noted

| **Steps** | **Screenshots** |
| --- | --- |
| 1. Go to <https://portal.cms.gov/>and select **Login to CMS Secure Portal**on the CMS Enterprise Portal.   ***Note:*** *The CMS Enterprise Portal supports the following browsers: Internet Explorer 11, Firefox, Chrome, and Safari*. | Portal Landing Page |
| 1. Read the ‘Terms and Conditions’ pageand select **I Accept**to continue. | I Accept the Terms and Conditions |
| 1. Enter your **User ID** and select **Next**. | Enter User ID |
| 1. Select the **Register MFA Device** link. | Password, MFA Device Type, and Security Code Page Register MFA Device Link |
| 1. Select **OK** to navigate away from the login page. | Unable to Access Security Code pop up |
| 1. Read the ‘Terms and Conditions’ pageand select **I Accept**to continue. | I Accept the Terms and Conditions |
| 1. Enter your **User ID** and **Password** and select **Log In**. | User ID and Passworf Log In Page |
| 1. Answer the challenge questions and select **Next**. | Answer the following challenge questions |
| 1. Select an **MFA Device Type** from the drop-down list.   ***Note****: You can select the arrows on the left of each MFA Device Type for additional information.* | Register Your Phone, Computer, or E-mail |
| 9a. If selecting **Phone/Tablet/PC/Laptop** as the **MFA Device Type**, enter the alphanumeric code that displays under the field labeled **Credential ID** (on the VIP Access software) in the **Credential** **ID** field. Enter a brief description (e.g., Laptop) in the field labeled **MFA Device Description**. Then select **Next**. | Phone/Tablet/PC/Laptop MFA Device Type Credential ID and MFA Device Description fields  VIP Access Software Example with Credential ID and Security Code |
| 9b. If selecting **Text Message – Short** **Message Service (SMS)** as the **MFA Device Type**, enter the **Phone** **Number** that will be used to obtain the Security Code. Enter a brief description (e.g., Text) in the field labeled **MFA Device Description** and select **Next**. | Text Message - Short Message Service (SMS) MFA Device Type Phone Number and MFA Device Description fields |
| 9c. If selecting **Voice Message – Interactive Voice Response (IVR)** as the **MFA Device Type**, enter the **Phone** **Number** and corresponding **Extension** that will be used to obtain the Security Code. Enter a brief description (e.g., IVR) in the field labeled **MFA Device Description** and select **Next**  *.* ***Note:*** ***Extension*** *is an optional field. You* may *choose to provide a 10-digit phone number or a phone number with an extension.* | Voice Message - Interactive Voice Response (IVR) MFA Device Type Phone Number and MFA Device Description fields |
| 9d. If selecting **E-mail** as the **MFA Device Type**, the e-mail address on your profile will be automatically used to obtain the Security Code. Enter a brief description (e.g., e-mail) in the field labeled **MFA Device Description** and select **Next**.  ***Note:*** *The e-mail address cannot be changed at the time of MFA device registration. It can only be changed using the 'Change E-Mail Address' option from the 'Change My Profile' menu.* | E-mail MFA Device Type E-mail Address and MFA Device Description |
| 1. Select **OK** to return to the login page.   ***Note****: You will receive an e-mail notification for successfully registering your MFA device.* | Successful Registration of MFA Device Page Example |

# Step-by-Step Instructions for ‘Forgot User ID’ Link

These instructions demonstrate the ‘Forgot User ID’ process for users who do not remember their registered User ID to login. Please follow each step listed below unless otherwise noted.

| **Steps** | **Screenshots** |
| --- | --- |
| 1. Go to <https://portal.cms.gov/>and select **Login to CMS Secure Portal**on the CMS Enterprise Portal.   ***Note:*** *The CMS Enterprise Portal supports the following browsers: Internet Explorer 11, Firefox, Chrome, and Safari*. | Portal Landing Page |
| 1. Read the ‘Terms and Conditions’ pageand select **I Accept**to continue. | I Accept the Terms and Conditions |
| 1. Enter your **User ID** and select **Next**. |  |
| 1. Enter the following information and select **Next**:  * First Name * Last Name * E-mail Address * Zip Code * Date of Birth | Forgot User ID Page enter the following information |
| 1. Select **OK** to return to the CMS Enterprise Portal landing page.   ***Note****: You will receive an e-mail notification that will contain your User ID. This e-mail will be sent to the e-mail address on your profile.* | Forgot User ID: Information Successfully Verified Page |

# Step-by-Step Instructions for ‘Forgot Password’ Link

These instructions demonstrate the ‘Forgot Password’ process for users who do not remember their registered User password to login. Please follow each step listed below unless otherwise noted.

| **Steps** | **Screenshots** |
| --- | --- |
| 1. Go to <https://portal.cms.gov/>and select **Login to CMS Secure Portal**on the CMS Enterprise Portal.   ***Note:*** *The CMS Enterprise Portal supports the following browsers: Internet Explorer 11, Firefox, Chrome, and Safari*. | Portal Landing Page |
| 1. Read the ‘Terms and Conditions’ pageand select **I Accept**to continue. | I Accept the Terms and Conditions |
| 1. Enter your **User ID** and select **Next**. | Enter User ID |
| 1. Select the **Forgot Password?** link. | The Forgot Password? Link on the CMS Enterprise Portal Password Page and Password, MFA Device Type, and Security Code Page |
| 1. Enter your **User ID** and select **Next**. | Forgot Password page, enter User ID field |
| 1. Answer the challenge questions, enter **New Password**, **Confirm Password**, and select **Next**. | Forgot Password page, answer challenge questions |
| 1. Select **OK** to return to the CMS Enterprise Portal landing page.   ***Note****: You will receive an e-mail notification for successfully changing your Password.* | Password Succesfully Changed Page |